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ABSTRACT

While the evaluation of organizational consultation is becoming a more public activity, there is still much to be learned in this area. The complexity and uniqueness of most organizational consultation have contributed to the paucity of studies to evaluate the processes involved. Organizational consultation is an ongoing process; continual feedback and formative evaluations make consultation difficult to describe and evaluate. Consequently, most evaluations are outcome, rather than process, studies. Outcomes of organizational consultation can be identified, quantified, and compared. The processes of reaching the outcomes, however, will vary with the organization, the consultant, and the problems. Client satisfaction will probably continue as an important and widely used indicator of consultation effectiveness. Program evaluation standards being developed by the Evaluation Research Society may one day be converted to a checklist to be used in rating the degree to which a standard has been met. A major strength of good organizational consultation is the flexibility of all parties involved. Organizational consultation should continue as a skill which practitioners from many disciplines utilize while remaining specialists in their own disciplines. (Author/NRB)

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# Evaluating Organizational Consultation in a Changing World[1]

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Running head: Organizational Consultation

# Evaluating Organizational Consultation in a Changing World[1]

How to evaluate organizational consultation is not a new problem. I remember that Ed Glaser, I, and others spoke from this convention platform on this topic 25 years ago. There were a few presentations on this topic in the years before 1955, and certainly there have been many since that time. I feel that we have made progress since then in our understanding of the problems and difficulties of trying to evaluate consultation. However, there is still much to be done.

In this paper I will review some of our areas of progress in groping toward solutions to the problem of evaluating organizational consultation. I will mention shortfalls as well as accomplishments. Then I will suggest some next steps.

Twenty-five years ago, the term consultation had just emerged from its medical cocoon. Far fewer people worked as consultants then than now, and most of these provided clinical psychological services. Today it seems to me that all of my colleagues and neighbors are willing to provide consultation, and many do. It sometimes seems that everyone is a consultant. The variety of topics and fields concerning which they are invited and are ready to consult seem infinite. The techniques which they use and the writings about consultation have multiplied in recent years. While I doubt that consultation was ever in the closet, it has certainly come out into the open now.

It might well be said that consultation is everywhere, ubiquitous and omnipresent.

Despite this, or perhaps because of it, I feel that we have made progress in the conceptualization and description of the consultation process. There is greater agreement among us all about different types or kinds of consultation, and about some of the do's and don'ts. Models of organizational consultation are more clear and certainly more numerous today. The standards for program evaluation being developed now by the Evaluation Research Society (Note 1) are a major effort to synthesize evaluation practices and certainly apply to organizational consultation. Consultants today are more willing to talk about their work, what they do, how they do it, etc., at least in the human services areas (Kurpius, 1978). The data in the two studies reported here today would have been much more difficult to obtain 25 years ago. Consultants then seemed more secretive and the climate for the evaluation of consultation was less hospitable.

I accept the description of the evaluation of organizational consultation suggested by our co-chairs " . . . a systematic effort to define the processes at work in a consulting intervention, and to assess the effects of this intervention for the client organization." (Backer and Glaser, Note 2).

I conceive of organizational consultation as an ongoing process with lots of feedback loops at each level and stage of consultation. For example, most consultants are brought in to deal with one or more problems. These problems must be located,

identified, explored and sometimes redefined. The settings of these problems must be explored until suggestions and ideas for change emerge. When the changes are instituted, new problems often arise and the process is repeated. The feedback should occur about the identification of the problems, about the proposed solutions, and about the effects of the solutions, including whatever new problems emerge. I favor as much feedback to and from as many people as possible.

The feedback, within a climate of commitment to follow through with corrective actions, should have the effect of correcting and improving the service activities of the organization. This change as a result of feedback should be a continual process, going on all the time, as the organization is accomplishing its goals. The phrase, formative evaluation, has been used to describe this activity (formative in contrast to summative evaluation). When continual feedback and formative evaluation are involved, the activity and services of the organization are constantly changing, evolving, and improving. The consultation, of course, will shift and change to accomodate the changing organizational activity. To describe and evaluate such constantly changing processes are difficult.

It is no surprise, then, that there have been more outcome than process evaluations of organizational consultation in the past 25 years. Dr. Larsen's report here on this panel is based on some of these (Note 3). She describes several outcome criteria which have been used to evaluate outcomes. As in the past, tight controls are difficult to devise when studying

complex and ever-evolving organizations. Campbell and Stanley (1963) have proposed designs to deal with some of these complexities and their suggestions represent real progress.

Even in outcome evaluations of organizational consultation, all is not straightforward and simple. There are often multiple agendas and purposes for consultation. In a complex organization some of these may not be consistent with each other. The identification of such inconsistent goals may end consultation at an early stage or it can be very facilitative. If goals for the consultation can be identified and agreed upon, and if measures of progress toward these goals can be developed or found, then this purpose can be evaluated.

Evaluations of the process of organizational consultation are much more rare. The Glaser and Backer interviews with 18 distinguished consultants, described here on this panel, is a clinical approach to process evaluation (Note 4). Their consultants revealed the diversity and complexity of their consultation activities and practices, as well as some of the similarities. Meyers, Parsons, and Martin (1979) were able to cite only 3 major studies of the process of mental health consultation in the schools in contrast to relatively large numbers of outcome evaluation studies. Even the questions to be asked in evaluations of process seem less clear and direct than in outcome evaluations.

Evaluations of process may best be considered in relation to desired outcomes. The skills of the consultant and the receptivity of the client organization are significant relevant

variables. And this total picture can become extremely complicated. The fact that there are many more outcome than process evaluations of organizational consultation suggests that there are many roads to Rome. While agreement on goals, objectives and outcomes can be hammered out, this may be less true for the question: how are the consultation outcomes achieved.

Outcomes of organizational consultation can be identified, quantified, and often compared. However, the processes of reaching the outcomes will vary to fit the organization, the consultant, the problems, etc. Is the process independent of the consultant and the consultee--probably not, in my opinion. This is why I believe that organizational consultation in the future will not evolve toward a separate discipline of consultation independent of consultants' skills and knowledge drawn from their initial disciplines. Rather organizational consultation is and will continue to be a special skill, developed in addition to the usual skills of one's initial and basic discipline.

I think that client satisfaction will continue to be a most important and widely used indicator of the effectiveness of organizational consultation. Such an indicator can be utilized in almost any situation, no matter how complex. It is also a practical variable with high face validity. Most people will accept client satisfaction as one important criterion.

When organizational consultation involves evaluation of human service organizations at the behest of an outside group

or agency, the goals and satisfactions of several levels of clients must be clearly identified and differentiated. In such a situation there are at least four levels of clients: 1) those individuals who receive services from the organization being evaluated, 2) the staff of the organization which provides the services, 3) the community which may provide financial and other support to the organization, and 4) the outside group requesting the evaluation. Usually the goals of the latter group will be considered as most important by the consultant. However the goals of the other clients can not be ignored. The more clearly the goals of each group can be specified, the more likely it is that the consultation can be evaluated successfully.

As has been noted earlier (Barry, 1970) fixed design research to evaluate organization consultation is very limited because of the complexity of problem situations and their lack of comparability. Yet, Dr. Larsen's report (Note 3) illustrates comparisons of evaluations among a number of similar units. Thus at one level, such research can be done when common long range goals can be established across organizations or units.

The program evaluation standards being developed by the Evaluation Research Society (Note 1), once they are agreed upon and tested out, might be converted to a checklist. After it is determined that a given standard is appropriate for a particular evaluation problem, a rating of the degree to which the standard has been met might be made. I do not strongly recommend this today--but it is an approach to conceptualizing and

formalizing the evaluation of organizational consultation which can be followed in the future.

One of the hallmarks and major strengths of good organizational consultation is the flexibility of all parties in the consultation process. Two or more consultants will interact differently with a client organization. They will conceptualize the organization's activities somewhat differently and conceive of somewhat different solutions to problems. Frequently several different solutions can be helpful. There are many pathways toward the goal in a complex setting. The uniqueness of the client-consultant interaction must not be violated in the attempt to evaluate the consultation. Perhaps this is why process variables in consultation are so hard to evaluate. Perhaps this is why clinical descriptions of the process of consultation continue to be a very promising approach to our increased understanding.

My title implies some attempt to describe the directions in which organizational consultation may develop in the future. It is likely that consultation practices and technology will continue to be made more public, will be more extensively studied, and that further communalities will emerge. A major step in this direction was the recent National Conference on Training in Consultation, an attempt to look at many types of consultation both across disciplines and across arenas of applications, e.g., in the school, in the mental health services, and in business. There was much more agreement than disagreement on definitions, roles, and functions than most

had expected at that conference.

To summarize, for the near future there are pressures for the professionalization of organizational consultation. Evaluation is a part of this and can contribute to it. In the long run, I believe organizational consultation will continue as a skill which practitioners from many disciplines utilize while remaining specialists in their own disciplines. I feel this will continue and is the most efficient and promising way to develop.

## Reference Notes

1. Evaluation Research Society: Standards for Program Evaluation: Exposure Draft, May, 1980.
2. Backer, T. E. and Glaser, E. M. Personal communication, 1980.
3. Larsen, J. K. Evaluating consultation: A comparison of measures. Paper at Annual APA Convention, Montreal, 1980.
4. Glaser, E. M. Evaluating consultation effectiveness: The views of 18 experienced consultants. Paper at Annual APA Convention, Montreal, 1980.

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## Footnote

[1]Adapted from a paper presented at the APA Division 13 symposium "Evaluating Organizational Consultation: Some Basic Guidelines," in Montreal, September 3, 1980.